

How to use DEXT prepare

DEXT Prepare can process your records, extract the financial information, and send it to directly to us, all with a couple of clicks.



PAPER RECEIPTS

Open the app on your phone.

Tap the 'photo' button.

Get a clear image of the receipt.

Once you've taken your photo, tap the arrow in the top right to send.

You can also attach a description at the bottom.



ONLINE INVOICES

You can forward emails and attachments to DEXT Prepare.

When your profile is created, we will assign you an 'email in' address which is linked to your account.

To find it, log into DEXT Prepare on your browser and go to 'My Profile', then 'My Details' on the sidebar.

You will see it in the 4th section.



SALES INVOICES

For sales and bank statements, you need to log onto the browser version of Dext Prepare (not the app).

Go to 'Bank' on the sidebar, and click the green 'Add Bank Statements' button on the top right.

You will see a dropdown list of all the 'bank accounts' you have created on Dext Prepare.

Below this is a link to 'add a bank account' for new accounts.

Either drag/drop files into the big green box, or click it and select which documents you want to upload.



BANK STATEMENTS

For sales and bank statements, you need to log onto the browser version of Dext Prepare (not the app).

Go to 'Sales' on the sidebar, and click the green 'Add Sales' button on the top right.

Either drag/drop files into the big green box, or click it and select which documents you want to upload.